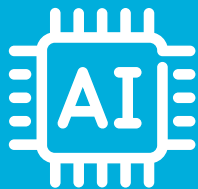




AI Enablement, Data Governance & Master Data Advisory Services



Service Definition

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Why 5Y?

We take a different approach to data transformation

We believe transformation starts with insight, not systems. We're disrupting the traditional landscape with a suite of platforms, services and solutions that get you from raw data to insights faster and more cost-effectively than ever before.



Faster Insights. Lower Costs. Better Outcomes. Guaranteed.

We empower organisations to become data-centric by accelerating access to data from any system or application. We transform this data into actionable insights that guarantee to drive improved business outcomes and enable sustainable growth.

We're confident we can deliver these outcomes because we've done it for others—turning data chaos into clarity and inefficiencies into savings.

80%

of your BI analytics ready out of the box from day one

50%

faster implementation, freeing up your team's time and budget

50%

reduction in data engineering costs

*The "80% analytics-ready" figure applies specifically to engineering tasks such as data ingestion, integration, and preparation. The 50% faster implementation and 50% reduction in engineering costs are based on our observed averages across typical client projects. Actual results may vary depending on project scope, data quality, and unique business requirements.

We believe in a data-centric future.

Everything we do is driven by the following four principles...

Build systems, deliver outcomes.

Our aim is always to go beyond technology, helping organisations use data to drive meaningful, lasting change.

Insight should be embedded, not episodic.

We designed our platforms to not only unify data but also empower people to act on it every day.

Independence over dependency.

Our goal is to enable customers to self-serve, not to lock them into long-term service contracts.

Enablement, not ownership.

We built a modular platform so customers could scale at their own pace. Where customers need additional support, we offer a managed service model to help them succeed.

The 5Y way

We believe organisations shouldn't have to choose between speed, quality and cost when becoming data-driven. The world is constantly evolving and businesses that build systems from scratch or rely on slow, expensive consultancies will get left behind.

Service Overview

Our AI Enablement, Data Governance & Master Data Advisory Services provide structured, advisory only support to help public sector organisations:

- Establish robust governance frameworks to guide responsible AI adoption.

- Strengthen data management practices to ensure accuracy, consistency, and trust in organisational data.

- Define clear accountability foundations so roles, responsibilities, and decision making around AI are transparent and well structured.

The service focuses on defining clear governance frameworks, operating models, and decision-making accountabilities that underpin AI-enabled use cases, without implementing or operating systems. We support organisations to assess readiness, clarify data ownership, improve data quality principles, and align data and AI governance approaches with regulatory, ethical, and organisational requirements.

This service is designed to support organisations at any stage of AI maturity, from early exploration through to scaling AI initiatives, by ensuring data and AI are governed in a transparent, consistent, and sustainable manner.

Service Features

The service may include the following advisory activities:

Organisational AI readiness assessment, evaluating current data maturity, governance structures, policies, culture, and capability to support AI adoption

Design of data governance operating models, including decision rights, escalation routes, and accountability structures aligned to organisational context

Definition of data ownership and stewardship roles, clarifying responsibilities for data quality, integrity, access, and lifecycle management

Advisory support on master data management (MDM), including identification of critical master data domains and recommended domain ownership models

Development of data quality principles and policies, covering data standards, validation, monitoring, and remediation approaches

Advisory on responsible and ethical AI usage, including principles for transparency, fairness, explainability, and human oversight



All activities are delivered on an advisory basis, with no system configuration, hosting, or operational data management provided. z

Service Benefits

By engaging this service, organisations may realise the following benefits:



Clarified accountability for data management and AI-related decision-making



Reduced governance ambiguity, enabling consistent and transparent oversight across teams and programmes



Improved consistency and reliability of critical business data, supporting analytics and AI use cases



Support for responsible, ethical, and transparent AI adoption, aligned to public sector values



Stronger compliance posture, with governance aligned to data protection and regulatory expectations



A sustainable foundation for AI adoption, reducing reliance on ad-hoc or unmanaged practices

Service Scope

The AI Enablement, Data Governance & Master Data Advisory Services are delivered on an advisory only basis. The service provides organisations with structured guidance and artefacts to support responsible AI adoption. This may include, for example:

Assessments, such as evaluating organisational AI readiness, reviewing existing data governance policies, or analysing current data quality processes.

Governance design activities, including the development of data governance operating models, stewardship role definitions, and decision making frameworks.

Master data advisory, such as identifying priority master data domains (e.g., customer, asset, location) and recommending ownership and maintenance approaches.

Policy and standards development, for example drafting data quality principles, metadata standards, or AI ethics and oversight guidelines.

Support for organisational alignment, including producing governance artefacts (e.g., RACI matrices, governance charters) and facilitating stakeholder workshops.

The service does not include implementation, configuration, hosting, operation, or ongoing monitoring of AI systems, data platforms, or governance tooling unless explicitly agreed.

Service Constraints

Delivery of this service is dependent on the following:

- Agreed scope and statement of work defining the required advisory outputs

- Timely access to organisational documentation, including policies, standards, existing governance artefacts, and relevant data sources

- Availability of appropriate customer stakeholders for interviews, workshops, reviews, and decision making activities

- Provision of architectural, data, and operating model information where required to inform accurate recommendations

All advice and recommendations are based on the information provided by the customer and reflect the organisational, regulatory, and technological context at the time of delivery.

What Is Not Supported

The following activities are not included within this service unless explicitly agreed:

- Software resale** (including licences or third-party product procurement)

- Hosting provision** (we do not host, deploy, or run customer systems or environments)

- End-user licensing or subscription management**

- Ongoing managed services**, such as operational monitoring, system administration, or platform management, unless explicitly offered in a separate agreement

Support Delivery Model

Support for this service is delivered through a clear and accessible advisory model, ensuring organisations receive timely, expert assistance throughout the engagement.

Support can be delivered remotely as standard, with on site support available where agreed. Customers may engage with a named consultant or a pooled team depending on the scale and nature of the work.

Support Hours & Availability

Core Support Hours

Support is available during standard UK business hours:

- | Monday–Friday, 09:00–17:30 (UK time)
- | Excludes UK public holidays

During core hours, customers can access:

- | Email and ticketing support
- | Phone support
- | Web chat support
- | Scheduled remote calls and working sessions

Out of Hours Availability

Out of hours availability can be arranged where explicitly agreed in the Statement of Work. This is typically reserved for:

- | High priority issues that may impact ongoing delivery
- | Urgent clarification required to maintain project timelines

Urgent Issue Handling

Urgent or high severity issues are prioritised:

- | P1 – Critical: Response within 4 hours; urgent escalation and resolution within 1 business day
- | P2 – High: Response within 4 hours; resolution typically within 2 business days

These definitions ensure customers receive rapid support when critical issues arise.

Communication During Incidents

Customers receive:

- | Confirmation of issue logging
- | Regular updates at agreed intervals
- | Notifications of required inputs or clarifications
- | Confirmation once an issue has been resolved

Post Incident Reporting

For P1 or significant P2 issues, customers may receive:

- | A post incident summary
- | Root Cause Analysis (RCA) where appropriate
- | Recommended corrective actions
- | Lessons learned and process improvements

Remote and On Site Support

Remote Support (Default)

Most support is delivered remotely for efficiency and rapid access to expertise.

This includes:

- | Ticketing and email guidance
- | Phone and web chat support
- | Remote workshops, interviews, and working sessions

On Site Support (Where Agreed)

On site support may be provided for activities that benefit from in person facilitation, such as:

- | Governance or AI readiness workshops
- | Cross functional stakeholder sessions
- | In person interviews and reviews
- | High priority decision-making sessions

On site visits must be agreed in advance and may incur additional cost.

How Support Requests Are Raised

Email

Customers can raise support queries, submit documentation, and request clarification via email.

Online Ticketing System

The ticketing system enables:

- | Logging and tracking of requests
- | Visibility of ticket status and priority
- | Adding updates, documents, and additional context
- | The portal is fully WCAG 2.2 AA accessible.

Phone Support / Scheduled Calls

Phone support is available during core hours for time sensitive needs. Customers can also book:

- | Working sessions
- | Progress reviews
- | Workshop-style discussions with consultants

Named Contact or Service Desk

Depending on the engagement type:

- | A named consultant may act as the single point of contact
- | Or a service desk model may route requests to the correct specialist within the pooled delivery team

Issue & Escalation Management

Issue Identification & Logging

Issues may be identified by:

- | Customer stakeholders
- | Consultants during delivery activities
- | Documentation review
- | All issues are logged through the email or ticketing system.

Severity Assessment

Issues are categorised as:

- | P1 – Critical
- | P2 – High
- | P3 – Medium
- | P4 – Low

Severity drives the response and resolution approach.

Escalation Routes

Escalation paths ensure appropriate oversight:

- | Consultant → Senior Consultant
- | Senior Consultant → Practice Lead
- | Practice Lead → Engagement Lead

Escalation may be triggered by severity, delivery impact, or risks requiring higher level intervention.

Resourcing Model

Named Consultant

A named consultant may be allocated to provide continuity, deep organisational understanding, and a single point of contact throughout the engagement.

Pooled Delivery Team

For larger or multi stream engagements, a pooled team ensures access to a broader set of specialists, such as:

- | Data governance consultants
- | AI ethics advisors
- | Data quality and metadata specialists
- | Master data management experts
- | Organisational design and policy specialists

Engagement Types

Ad Hoc Support

For small, targeted advisory needs such as:

- | Light touch document reviews
- | Best practice clarification
- | Short questions or targeted guidance

Time Boxed Engagements

Fixed duration advisory sprints, typically used for:

- | Governance maturity assessments
- | Drafting data principles and standards
- | Producing operating model components

Project Based Support

Structured, multi phase advisory programmes for:

- | Enterprise governance operating model design
- | AI readiness assessments
- | Master data domain ownership frameworks

Onboarding & Service Initiation

Onboarding is designed to ensure the service starts smoothly, with clear alignment on scope, responsibilities, timelines, and access requirements. Service initiation begins once the buyer has confirmed the Statement of Work and provided the required prerequisites.

1. Kick Off & Engagement Mobilisation

When the service begins, we initiate a structured onboarding process that includes:

- Kick off meeting** to introduce the delivery team, review objectives, confirm engagement approach, and agree communication channels.
- Review of prerequisites**, including existing governance artefacts, data documentation, and organisational context required for advisory work.
- Access setup**, ensuring consultants have appropriate access to materials, documentation, and stakeholders.
- Confirmation of dependencies and assumptions**, including timely access to SMEs and any required environmental or architectural information.
- Agreement on any additional onboarding needs**, such as accessibility adjustments, early workshop planning, or alignment with internal governance cycles.

2. Information Required From the Customer

To begin the engagement effectively, the customer will need to provide:

Relevant organisational documentation, such as governance policies, operating models, standards, data dictionaries, and AI-related guidance.

Architecture and data landscape information, including system diagrams, metadata catalogues, or descriptions of data flows where required.

Stakeholder availability, including business owners, data stewards, architects, compliance or risk leads, and other SMEs for interviews and workshops.

Any constraints or internal timelines, such as governance board dates, transformation milestones, or planned policy updates.

This structured initiation process ensures both parties begin with a shared understanding of scope, expectations, and governance, enabling a smooth transition into advisory delivery.

3. Confirming Scope, Timelines & Responsibilities

Following the kick off meeting, we formally confirm the structure of the engagement through:

Scope Confirmation

For small, targeted advisory needs such as:

Revalidating the agreed scope in the Statement of Work.

Clarifying in scope and out of scope activities, deliverables, and decision points.

Ensuring alignment with customer priorities, timeframes, and governance processes.

Timeline Planning

Producing a delivery plan that outlines key milestones, workshop dates, review cycles, and approval points.

Confirming working patterns, communication cadence, and any fixed deadlines (e.g., board meetings, audit reviews).

Aligning deliverable review cycles to meet expected turnaround times.

Roles & Responsibilities

Documenting roles on both sides (e.g., named consultant, customer project lead, SMEs).

Assigning responsibilities for decision making, document review, approval, and information provision.

Identifying escalation routes for risks, blockers, or delays.

Offboarding & Exit Support

Offboarding ensures a smooth, well managed conclusion to the engagement, with clear handover of deliverables, knowledge, and documentation so the organisation can continue operating confidently after the service ends. The process is designed to minimise disruption and support long term sustainability of governance and AI related practices.

1. Offboarding Activities

At the end of the engagement, we complete a structured offboarding sequence that typically includes:

Formal handover of all artefacts, including frameworks, policies, role definitions, assessment outputs, and recommendations.

Knowledge transfer sessions, providing structured walkthroughs of the delivered artefacts to ensure customer teams fully understand the governance models, role definitions, operating structures, and recommendations. These sessions may include:

- Explanations of how each framework or model should be applied in practice

- Walkthroughs of key decisions, assumptions, and design rationale

- Guidance on how to maintain and update the artefacts after the engagement

- Clarification of roles and responsibilities for business, data, and technical teams

- Practical next-step actions to embed the new governance approach within BAU processes

This ensures the organisation is equipped to confidently adopt, manage, and evolve the delivered outputs following service completion.

Review of deliverables and decisions, confirming that all agreed outputs have been completed and accepted.

Documentation package, such as:

- | Governance frameworks
- | Operating model documents
- | Policy drafts
- | Workshop summaries
- | Any supporting guidance or templates

2. Information Required From the Customer

To complete offboarding effectively, we may require:

Confirmation that all deliverables have been reviewed and accepted, including any final edits or clarifications.

Approval to securely delete any customer provided data, documents, or extracts.

Identification of remaining questions, risks, or dependencies that should be addressed before closing the engagement.

Contact details for operational or BAU owners who will take responsibility for governance or AI related processes post engagement.

3. Confirming Scope, Timelines & Responsibilities for Exit

Before completing offboarding, we confirm all closure steps through a structured approach:

Scope Confirmation

We review the Statement of Work to ensure all in scope deliverables and activities have been completed.

Any remaining advisory items, follow up clarifications, or actions required from the customer are identified and recorded.

Timeline Agreement

We agree the expected dates for:

- | Final document handover
- | Knowledge transfer sessions
- | Exit review meeting (if required)
- | Data deletion confirmation

These steps ensure the offboarding timeline is predictable and aligned with customer availability.

Roles & Responsibilities

Responsibilities are clarified for:

- | Customer acceptance of deliverables
- | Sign off for data deletion
- | Identifying any ongoing BAU owners
- | Determining whether further phases or additional advisory support are needed

Escalation routes remain in place until offboarding is formally completed.

Security & Data Protection

The service is delivered in line with robust security and data protection practices to ensure the confidentiality, integrity, and appropriate handling of customer information throughout the engagement.

Access Controls

Access to customer provided information is restricted to authorised personnel involved in delivering the service.

Permissions are granted on a least privilege basis, ensuring consultants only have access to the documents and materials required to perform agreed advisory tasks.

Role Based Permissions

Access rights are assigned based on the role and responsibility of each consultant within the engagement.

Named consultants or specialists receive access only where relevant to their activities (e.g., governance assessments, policy reviews, or operating model design).

Access is reviewed and revoked at the end of the engagement as part of the structured offboarding process.

Secure Handling of Customer Data

Customer documentation (e.g., policies, governance artefacts, architecture diagrams) is handled securely within our controlled environments.

Any customer data held during the engagement is stored in line with organisational security controls and is securely deleted once offboarding is complete and the customer confirms deletion.

No customer data is transferred outside approved systems or shared with unauthorised parties.

Alignment with UK GDPR

The service operates in adherence to UK GDPR principles, ensuring:

- | Lawful, fair, and transparent processing of customer information.
- | Purpose limitation—data is used solely to deliver the agreed advisory service.
- | Data minimisation—only the minimum information required is requested and retained.
- | Integrity and confidentiality—security controls prevent unauthorised access or disclosure.

As an advisory service, we typically act as a data processor for customer provided documents.

Secure Communication Channels

All communication with the customer takes place via secure channels,

- | Encrypted email
- | Secure online ticketing systems
- | Protected document sharing platforms
- | Managed video conferencing tools

Sensitive documents are exchanged only through these approved channels to maintain confidentiality and compliance.



Hosting & Data Location

Support for this service is delivered through secure, cloud based systems designed to protect customer information and ensure compliance with UK public sector expectations.

As this is an advisory only service and does not host or operate customer platforms, hosting considerations apply solely to the systems used to manage support requests, documentation, and communication.

Support System Hosting

Support channels (email, ticketing, documentation exchange) operate within secure, cloud based environments managed by the supplier.

These systems use enterprise grade security controls that align with UK public sector expectations for secure data handling, including strong access management, encryption, and residency appropriate hosting.

Customer Data Residency

The advisory service does not host or process customer production data.

Any customer information shared for advisory purposes (e.g., governance documents, policies, architecture diagrams) is retained only within approved, secure support systems.

No customer data is moved outside these environments, stored offshore, or transferred to unauthorised systems.

No Persistent Hosting of Customer Data

We do not store or persist customer datasets, platform data, operational logs, or system outputs.

Any temporary artefacts (e.g., workshop notes, annotated documents) are handled securely and deleted at offboarding once the customer confirms no further retention is required.

Data Residency for Support Logs & Artefacts

Support logs (e.g., ticket metadata, communication history) reside within the supplier's secure support systems.

These logs may include minimal personal data (e.g., names, contact details) but do not include customer datasets or sensitive operational data.

All logging data is stored within UK or UK aligned regions to meet public sector data residency and compliance expectations.

Logs are retained only for as long as necessary for audit, service quality, and contractual purposes.

Pricing Information

Pricing for this service is provided in the G-Cloud pricing document.

Client Success Story

From Fragmentation To a Unified Patient Experience



The Challenge:

Our client, a leading global healthcare group in the hearing care sector faced significant challenges after a major acquisition program in North America, inheriting fragmented and unstable legacy systems. These included customer relationship management (CRM) tools, patient management platforms, and heavily customised ERP systems, all containing overlapping and inconsistent B2C data. The challenge was immediate and complex: How do you consolidate private patient data across fragmented, unstable legacy systems into a single, trusted view—without disrupting ongoing operations or breaching regulatory compliance frameworks such as GDPR?

The Solution:

Deployment of the 5Y Unified Data Platform addressed these challenges by unifying data across legacy systems through a modular, Azure-native framework. With pre-built logic for mastering, survivorship, and recovery, the platform enabled seamless integration between modern front-end applications (CMS, AC App) and backend systems like NAV 17 and Dynamics CE. This solution maintained patient data, enhanced patient engagement across their care journey through stable omnichannel experiences and provided a scalable foundation for future growth—all while maintaining full compliance and operational continuity.

Business Impact

- Transformed disconnected patient records into a single trusted view
- Eliminated costly system outages

-70%
Duplicates

+85%
Matching

2×
Processing

12+
Countries

Client Success Story

From complex reporting requirements to actionable insights



The Challenge:

How do you give every team timely access to operational insights when manual reports are slowing you down? That was the challenge facing one of the UK's largest providers of affordable and social rent housing. While they had implemented Microsoft Dynamics 365 across the organisation, reporting remained slow, fragmented and heavily reliant on manual processes. A traditional system upgrade hadn't resolved the problem. Without a consistent, centralised reporting environment, decision-making was delayed and operational oversight was limited.

The Solution:

We deployed the 5Y Business Transformation Platform to centralise reporting, improve operational oversight and simplify access to key metrics across the business. By integrating Dynamics 365 with internal systems and applying a pre-built data model, we created a templated, cloud-based reporting and analytics environment aligned with the organisation's strategic goals. The outcome enabled teams to achieve real-time access to critical data through a single source of truth, replacing slow, manual reporting with governed, consistent insights.

Business Impact

Seamless integration of Dynamics 365 and other core systems

A secure, scalable environment designed for long-term transformation

80+
Self-Serve KPIs

Our Social Commitments

At 5Y, we believe business success goes hand in hand with responsibility. Our social commitments reflect our dedication to people, communities, and the planet.



Fair Work & Well-being

- | Fair pay above the National Living Wage.
- | Flexible working and open culture.
- | Health and well-being initiatives, including mental health support and certified Mental Health First Aiders.



Equality & Inclusion

- | Gender and ethnicity pay gap monitoring.
- | Active Women in Tech group and DEI training.
- | Recruitment practices promoting diversity and accessibility.



Skills & Growth

- | Personal Development Plans for every employee.
- | Annual training allowance and access to global certifications.
- | Apprenticeships and graduate programmes to nurture talent.



Community & Charity

- | Two paid volunteering days per year.
- | Annual charitable giving: A percentage of profit before tax donated to employee-chosen charities.
- | Partnerships with local charities and associations.



Environmental Action

- | Commitment to biodiversity initiatives such as tree planting
- | Working towards Net Zero through carbon offsetting initiatives

Together, we create a positive impact – for our people, our communities, and our planet.



Ethics & Responsibility

- | Mandatory modern slavery, sexual harassment and ethics training.
- | Whistleblowing and grievance policies.
- | Strong safeguarding and compliance processes.





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